

Belgium NewYork LLC(BNY)

Biggest Giant for Online Diamond Wholesaler

Customer Business in Brief:

The Belgium NewYork LLC(BNY), deals in diamonds. They are wholesalers of diamonds, they are the biggest competitor in the market to fulfill demands of various end customers who need diamonds wholesale. BNY comes into the picture and provides the platform to small merchants.

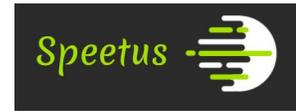
Customer Business Goals

To run a successful business a company always needs a strong software system that must be highly efficient and should play a vital role for business growth. Which also creates a smooth-running, centralized and simple-to-use software for reducing the hectic operations and making application based processes end to end associated with customers. Enable Sales Reps, Managers to collaborate and work more effortlessly As every company has some business goals, similarly BNY also has goals to achieve:

- Efficient utilization of Sales team,
- Track lead life cycle,
- Duplicate data management,
- Track communication of Lead and existing customers
- Call Telephony Integration CTI (Nextiva Integration)
- User, roles and hierarchy
- Data Integrity and Data security
- Inventory management
- Data Analytics: reports and dashboards
- Data Migration from legacy systems(Custom API Integration)

Challenges/Pain Points:

- Existing system is not capable enough to manage the different stages for the Lead.
- Follow up with the existing customers, Automations for feedback from customers.
- No duplicate management.
- No automated communication in absence of sales raps for call diversion.
- No single screen view of the lead with their other information.
- No tracking of sales raps activity, which helps manager to monitor sales rep performance
- Complete lead to customer journey
- No Pre-built Email Templates for sales rep for easy and fast use.



Solution Provided:

With the help of world's best CRM platform i.e. **Salesforce**. We have achieved and fulfilled all the business goals and challenges that BNY was facing, as a Service provider.

While achieving the goals we have used the salesforce out of the box features that intend to better use the Salesforce platform. On top of that we have customized the many features/requirements as per customer needs. Here are some glimpses:

Sample Lead Detail Page :

The screenshot shows the Salesforce Lead Detail page for a lead named "CHRISTIAN PJ test for Forwarded JAMIN" under the company "KRONOS AMERICA LLC". The lead is currently in the "Working" stage, with a progress bar showing stages: Working, NOT INTERESTED, Do not Deal in diamonds, Number not in service, INTERESTED, and Converted. The page is divided into several sections:

- Activity Details:** A table listing lead information such as Title, Name, Pay Score, Lead Status, Contact's Details (Mobile, Email, Fax, Business Class), Company Details (Company, Website, Account Opening Balance), and Address Information (Address, Created By, Last Modified By).
- Lead History (1):** A section showing the lead's history, including Date (8/24/2022, 3:08 AM), Field, User (Peter), Original Value, and New Value.
- Activity History (1):** A section showing the lead's activity history, including Task (Outgoing call), Due Date (8/24/2022), and Location.
- Related List Quick Links:** A section showing quick links to Lead History (1), Notes (0), and Files (0).
- Additional emails:** A section with an "Add Email +" button.

Lead Activity Page:

The screenshot shows the Salesforce Lead Activity page for the same lead. The page is divided into several sections:

- Activity:** A section with tabs for Log a Call, New Task, New Event, and Email. It includes a "Recap your call..." button and a filter for "Only show activities with insights".
- Upcoming & Overdue:** A section showing "No activities to show. Get started by sending an email, scheduling a task, and more."
- August 2022:** A section showing a list of activities, including "Outgoing call: 49 [Peter] -> 14804621763 [CHRISTIAN PJ test for Forwarded JAMIN, KRONOS AMERICA LLC]: 51s" on Aug 24.
- Lead History (1):** A section showing the lead's history, including Date (8/24/2022, 3:08 AM), Field, User (Peter), Original Value, and New Value.
- Activity History (1):** A section showing the lead's activity history, including Task (Outgoing call), Due Date (8/24/2022), and Location.
- Related List Quick Links:** A section showing quick links to Lead History (1), Notes (0), and Files (0).
- Additional emails:** A section with an "Add Email +" button.



Lead Click to Dial Features:

BNY-Nextiva Sales ... Home Leads Companies Customers Tasks Reports Dashboards Emails

Lead **CHRISTIAN PJ test for Forwarded JAMIN**

Activity **Details**

Title		Lead Owner	Peter
Name	CHRISTIAN PJ test for Forwarded JAMIN	Store Manager	
Pay Score	0	Lead Source	
Lead Status	Working	Segment	

▼ Contact's Details

Mobile		Rating	
Email		Phone	14804621763
Fax		Current Date&Time	
Business Class		TimeZone	
		Date In	

▼ Company Details

Company	KRONOS AMERICA LLC	Account Alias	
Website		No. of Employees	
Account Opening Balance		JBT ID	

Lead Convert Page:

BNY-Nextiva Sales ... Home Leads Companies Customers Tasks Reports Dashboards Emails References

Convert Lead

Account: Create New Choose Existing

Account Name:

Account Search:

0 Account Matches

Contact: Create New Choose Existing

Contact:

0 Contact Matches detected

Opportunity: Create New Choose Existing

Opportunity:

To find opportunity, choose an existing account

Record Owner:

Converted Status:

Cancel Convert



Create a Note:

The screenshot shows a CRM interface with a lead record titled "CHRISTIAN PJ test for Forwarded JAMIN" from the company "KRONOS AMERICA LLC". A "Create New Note" dialog box is open in the center, featuring several status options: "Call back later", "Dropped VM", "Call not answered", "Poc not available", "Not interested", "Not in service", and "Don't deal in diamonds". Below these options is a rich text editor with a toolbar and a "Notes" field. The background shows the lead's activity history, including an outgoing call and a task.

Lead Gmail or Outlook integration:

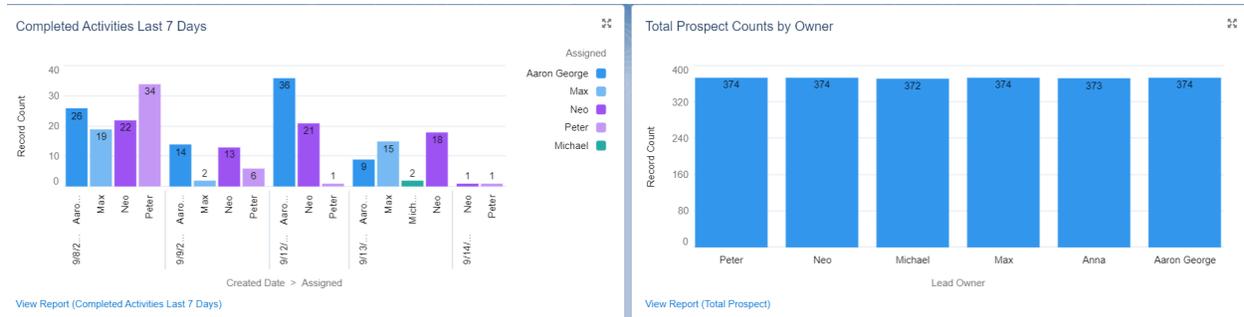
The screenshot shows the same CRM interface, but with the "Email" tab selected in the "Activity" section. The email composition area is visible, showing fields for "From" (Salesforce Support), "To", and "Subject". The background shows the lead's status as "Working" and the activity history, including an outgoing call and a task.



Dashboard sample 1:



Dashboard Sample 2:



After Implementation & Deliverability:

With the help of agile methodology we have successfully achieved the goal in various milestones, phase by phase in a given time frame. During each phase we have taken the feedback from end users like Sales rep and Manager, for continuous improvement. Because of this agile methodology, we were able to build the effective and easy to use.

We are still in the continuous evolution phase, and with respect to time we also proposed to customers the cost effective and less in business growth cost solutions.

Definitely we have achieved the goal with a sustainable software solution. With the use of Salesforce the growth tracked by the company is a considerable amount of percentage. The growth of BNY is what we have earned and this fulfills our motto i.e. **Speetus**, "Speed up your business with us".